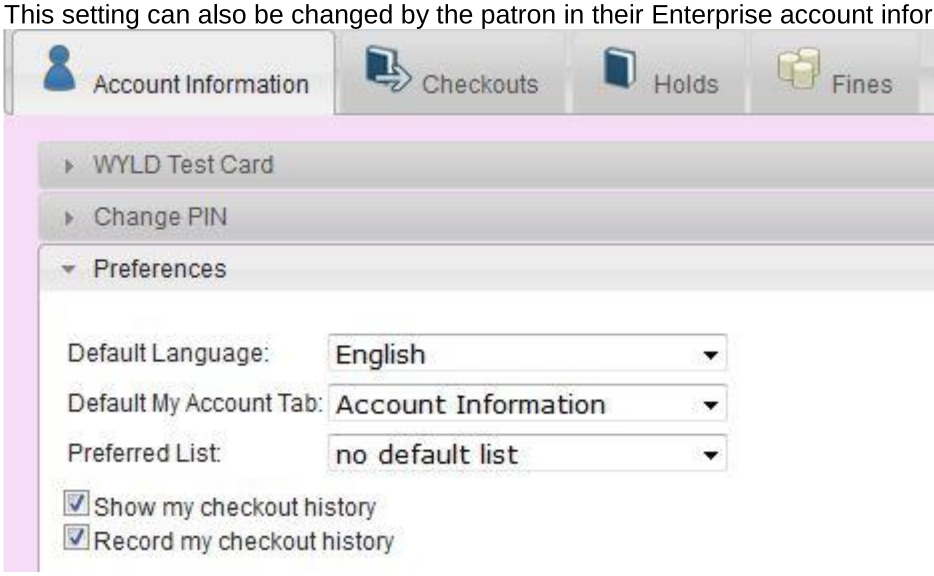
Patron Charge History

6/20/2014

Charge History in WorkFlows

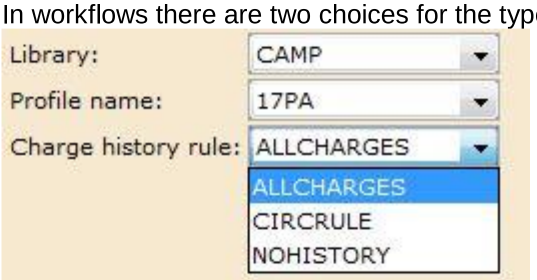
Starting in June of 2014, the **Charge History** feature was made available in Symphony Workflows. This feature tracks all charges to a patron record from the time it is enabled. It is not retroactive and records charges at the time of discharge. The default setting for registering new patrons is to **not** track charge history (NOHISTORY), although this can be changed in the properties for user registration.

This setting can also be changed by the patron in their Enterprise account information (preferences tab)



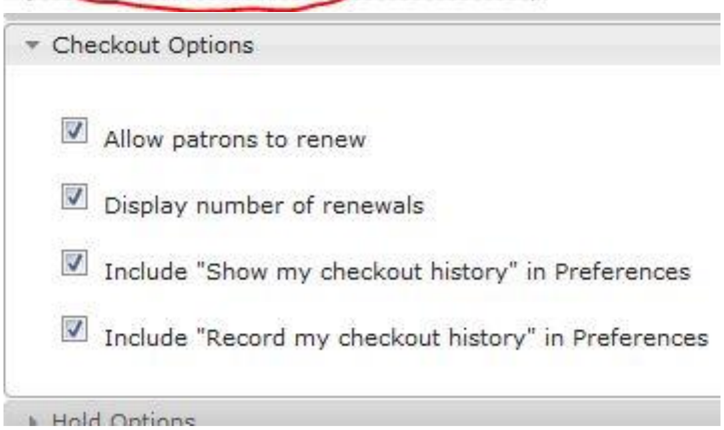
* Show my checkout history will show charges on the checkout tab in Enterprise
* Record my my checkout history will keep track of charges on the patron record, but will not show them in Enterprise if the 'show charges' box is not also ticked

In workflows there are two choices for the type of charge history to record: ALLCHARGES or CIRCRULE.



The WYLD office selected ALLCHARGES as the type of history to record, so staff should make sure to select ALLCHARGES when activating this feature on behalf of a patron, * as stated above, the default for registering new patrons is NOHISTORY.

To enable Charge History for patrons in Enterprise a setting must be changed in Enterprise admin. Go to Manage Profiles > Configuration > My Account Settings > Checkout Options



Check both boxes - "Include 'Show my checkout history' in Preferences" and "Include 'Record my checkout history' in preferences".

Removing Charge History

Although patrons can uncheck the box to record their charge history, this does not remove their charge history from the system. To completely remove a charge history, library staff must run the Purge Charge History report in the Circulation group of reports. This report lives in the Circcustom group. Select the “Purge single user charge history” and click “Setup and Schedule”. Click on the User IDs tab and enter the patron barcode in the User IDs field. Select the Update Option tab and check the “Update database records” check box. Select “Run now” at the bottom of the screen.